

Historic, Archive Document

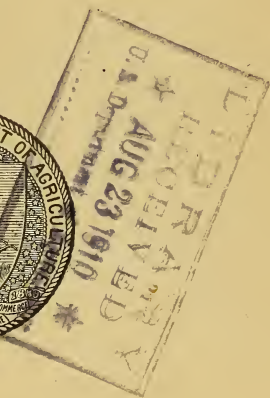
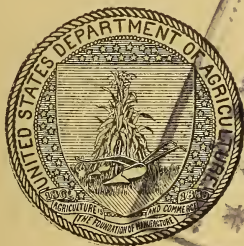
Do not assume content reflects current scientific knowledge, policies, or practices.

1
Ag 86 P

U. S. DEPARTMENT OF AGRICULTURE,
OFFICE OF THE SECRETARY.

PROJECT STATEMENTS.

DESCRIPTION AND USE.



WASHINGTON:
GOVERNMENT PRINTING OFFICE.
1908.

NOTE.

This manual is printed for the guidance of all concerned with the preparation of project statements and reports and with a view to securing uniformity in their use. Suggestions looking to the perfecting of the project scheme as applied to the work of the Department and to similar work in other institutions are invited.

W. M. HAYS,
Assistant Secretary.

WASHINGTON, D. C., *October 20, 1908.*

350776

PROJECT STATEMENTS.

INTRODUCTORY REMARKS.

The complex organization of research, business, and other work in the U. S. Department of Agriculture and in the State agricultural experiment stations has made necessary the formulation of a comprehensive and practical scheme of recording and filing project statements, including estimates and records of their cost. "A scheme of project statements adapted from a plan used in the Minnesota Agricultural Experiment Station has been improved upon and is being widely used in the U. S. Department of Agriculture and by State experiment stations. "

A project may be a line of research, education, business, or administration under the auspices of a public institution, a cooperative association, a business organization, or an individual.

The purposes of project statements, as outlined herein, are to secure clear-cut plans for all work; to supply officers with numerous plans in order that only those most important at a given

time may be authorized; to enable administrative officers to check up the plans of leaders and prevent their undertaking too much or not undertaking sufficient work; to aid in adjusting relations between administrators and project leaders and between project leaders in charge of related phases of work; to provide reports of progress which may be reviewed by administrative officers; to place responsibility for the expenditure of money; to avoid unnecessary duplication of work; to serve as a basis for judgment in the appropriation and allotment of funds; to protect prior rights of project leaders; to facilitate cooperation and continuation of work; to encourage continuity of service on a given project; to provide progressive recognition and remuneration for meritorious service; to arrange for the shifting of available men from finished to new projects; to provide for the transfer, demotion, or discharge of unsuccessful workers; to insure proper publicity to public and collective matters; to insure that proper credit shall go to those workers and institutions where credit is due; to make cost keeping practicable, and to provide for the closing up of projects and for the comparison of their cost with the results accomplished.

According to the testimony of many project leaders, especially investigators and heads of scientific bureaus, project statements, being sub-

ject to the criticisms of administrative chiefs and consulting scientists, cause clear and acceptable plans to be developed before actual work is begun, and thus lead to the most effective use of time and money. Under the necessity of presenting statements which can withstand review, project leaders are constrained to seek the friendly revision and constructive aid of their fellow-workers along related lines; in order that their plans may not be officially discarded, supplanted, or seriously modified, to the lessened credit of those taking the initiative.

Administrative officers are recognized as the leaders of administrative projects, while investigators and technicians are recognized as the leaders of research, educational, police, and business projects. Each project leader has clearly defined duties, is recognized with his helpers as a unit for accomplishing a definite piece of work, and is responsible for the expenditure of time and money. A leader may often have more than one project; some leaders may have scientific as well as administrative and other projects. A record is made of all dates, administrative acts, and discoveries, in order that any question of priority in the planning of work, the devising of methods, the discovery of truths, or the acquisition of property or other rights through priority may be settled by indisputable records.

It is believed that institutions under public support should, in general, freely publish their project statements or abstracts so as to open them to general discussion, give all workers a wider knowledge of methods, and reduce competitive suspicion to a minimum; but it is also believed that some new methods, discoveries, and investigations should be kept in confidence by filing only with administrative chiefs or by keeping to one's self until the time when publication is deemed wise by the project leader.

SUGGESTIONS FOR WRITING UP PROJECTS.

The samples of project statements, and the dummy herewith, illustrate the use of the project statement outlined on pages 8 and 9, also the project maps, records of progress, record of publications, record of allotment of funds, and record of cost. In writing up the projects, and in making reports thereon, it is desirable that project leaders and administrative officers follow the form and sequence given in that outline, and that the typewriter employ capitalization, indention, etc., in conformity with the sample exhibits presented for guidance.

Each report or other statement filed should show the project name, the project numbers, and the period covered. Administrative officers should place the date of receipt upon each original

project statement, and also upon each other report or statement received, using a pen or date stamp.

The following illustrates the normal course to be followed in the preparation of a project statement:

- a. Preparation of project statement by leader, aided by such friends in related work as he cares to consult.
- b. Reference to chiefs. Revision and suggestion by chiefs and those with whom they may consult for changes in scheme of work or in plan of organization and cooperation.
- c. Reference to Secretary's or Director's office. Revision, suggestion, and reference back for correction and approval by leader and chief.
- d. Approval by Secretary or Director and placing of copies on file in office of leader, of chief, and in office of Secretary or Director.
- e. When the plan of a project is materially changed, as by change of leader or by division into more than one project or otherwise, it is often well for the leader to rewrite the project statement.
- f. Annual records of progress on each project are due to be filed on November 1, also revised maps, records of publications, allotment of funds, and cost.

METHODS OF ARRANGING PROJECT MEMORANDA IN FOLDERS.

It is designed that these memoranda shall be written on ordinary letter-size sheets, that each project folder may be placed in a vertical filing case, and that the original Project Statement, Annual Record of Progress, Record of Publications,

Record of Allotment of Funds, and Cost-Keeping Record may be included in the folder under appropriate division sheets, the whole arranged in a logical scheme, with suitable indexes and references. Folders open at the side. Division sheets for separating the classes of data may be had upon application to the Division of Publications. The following divisions are provided in the order named: Project Map, Project Statement, Annual Report of Progress, Record of Publications, Annual Apportionment of Funds, and Annual Record of Cost. The latest report in each division is placed on top.

PROJECT MAP.

Placed annually on top, showing name of project, project numbers, objects (very briefly), and location of the current work, by States, counties, and towns. (A name is given to the project, short, expressive of its leading feature, and containing one or more catch words easily indexed.)

PROJECT STATEMENT.

[Original Project Statement prepared by leader.]

NAME: Nos. ----

LEADERS: (Names only of leader and at most a few principal helpers.)

HEADQUARTERS: (The leaders' post-office address.)

DATE SUGGESTED:

DATE AUTHORIZED:

DATE BEGUN:

LEGAL AUTHORITY: (Quote or cite language of appropriation bill.)

OBJECTS: (State briefly and clearly. Do not include procedure.)

METHOD OF PROCEDURE: (Here the method of approaching the problem defined under OBJECTS above should be concisely set forth. Where practicable, project the plan for the entire period of time required to complete the work, and follow with plan for annual or other natural periods or divisions of work. The project leader and his chiefs should consult advisers, and thus bring all available knowledge to bear in the perfecting of the plan; particularly if the project be a long-time, expensive proposition.)

ORGANIZATION AND COOPERATION: (Briefly state the entire plan of organization, whether part is under cooperation, part independent, etc., that misunderstandings may be reduced to a minimum. Clearly state relations to other departments, bureaus, divisions, experiment stations, other organizations, or to private parties cooperating.)

CONTRACTS: (Where necessary or wise to have written agreements or contracts and revisions of the same, file copies or, better, abstracts.)

SOURCES OF MAINTENANCE: (State amount from each fund.)

HISTORY: (State clearly the history, if any, previous to date original memorandum was written.)

ANNUAL RECORDS OF PROGRESS.

Annual statements of progress filed November 1 show the work done and results secured and include illustrative matter, statements of publications projected, changes in leaders, changes in headquarters, changes in location of work, changes in legal authority, changes in method of procedure, and reference to results not published.

PUBLICATIONS ISSUED.

Merely a list—official, cooperative, and unofficial.

MEMORANDUM OF ANNUAL APPORTIONMENT OF FUNDS.

Memorandum of funds set aside at the beginning of the year, as agreed upon between administrative officers and project leader.

COST-KEEPING RECORDS.

Regular annual cost-keeping statements show cost to date, cost for the year just closed, and estimated total cost. The following suggestions look to a uniform method of assembling and using the data by each bureau, office, division, laboratory, and project leader:

1. Charge expenditures under each project to the following accounts:

Salaries.

Traveling Expenses.

Miscellaneous Expenses.

Under these three subheads will be entered by project leaders only those amounts which are clearly chargeable to a given project and to no other.

2. At the end of the year or upon the termination of a project all salary, travel, and miscellaneous expenses chargeable to more than one project may be equably prorated to the various projects as estimated by the joint judgment of the project leader, the record clerk, and the administrator.

3. At the end of the year the cost of administration as recorded for administrative projects may be prorated to the various nonadministrative projects under the title "Administrative Project Charges," thus securing the entire cost of the respective nonadministrative projects. In general reports to the Department the cost of administration should not be duplicated by reporting it against administrative projects and also distributing to other projects.

4. Annually the cost to date of the respective projects is brought forward; and when a project is completed the final report includes a statement of the entire cost and of the scientific, economic, and other results.

NAMING AND NUMBERING PROJECTS.

A system of notation, in which abbreviations of names of departments, divisions, etc., are joined with serial numbers, is provided with

which to number each project folder and each report. Reference to other projects is made by using these numbers.

The method of abbreviation given below for naming and numbering projects coming into general use in the U. S. Department of Agriculture and in the State experiment stations has proven practicable in files, in reference indexes, in cost keeping, and in presenting summaries and details to department heads. The following illustrates the use of abbreviations:

U. S. Agr-----	U. S. Department of Agriculture.
W. B., U. S. Agr-----	Weather Bureau of the U. S. Department of Agriculture.
Fore., W. B., U. S. Agr.	Forecast Division of the Weather Bureau of the U. S. Department of Agriculture.
Minn. Sta-----	Minnesota State Agricultural Experiment Station.
Agr., Minn. Sta-----	Division of Agriculture or Agronomy, Minnesota State Agricultural Experiment Station.
Farm M., Agr., Minn. Sta.	Section of Farm Management, Division of Agriculture, Minnesota State Agricultural Experiment Station.
Crook. Br., Minn. Sta.	Crookston Branch Experiment Station, Minnesota.
Hort. Crook. Br., Minn. Sta.	Division of Horticulture, Crookston Branch Station, Minnesota.

The following are the abbreviations for the bureaus and separate divisions of the U. S. Department of Agriculture:

Acc.....	Division of Accounts and Disbursements.
B.A.I.....	Bureau of Animal Industry.
Biol.....	Bureau of Biological Survey.
Chem.....	Bureau of Chemistry.
Entom.....	Bureau of Entomology.
O.E.S.....	Office of Experiment Stations.
For.....	Forest Service.
Libr.....	Library.
B.P.I.....	Bureau of Plant Industry.
Pub.....	Division of Publications.
Roads.....	Office of Public Roads.
Sec.....	Office of the Secretary.
Solic.....	Office of the Solicitor (attorney).
Soils.....	Bureau of Soils.
Stat.....	Bureau of Statistics.
W.B.....	Weather Bureau.

The scheme contemplates that all projects of the Department shall receive serial numbers beginning with 1, as U.S.Agr. 1, 2, 3, etc.; also that each bureau shall number its projects serially as B.A.I. 1, 2, 3, etc.; and likewise each division, section, or laboratory. Thus the numbers U. S. Agr. No. 482, B.A.I. No. 77, A. H. 17, serve definitely to name and locate that project in the Department.

The project leader submits his project statement to his division chief, who gives to it the next *open* number in the division series. The division chief transmits a copy of the project statement to the bureau chief, who gives it the next open number in the bureau series, and the bureau chief transmits it to the Secretary.

Indexing in the Secretary's office is greatly facilitated by having the above numbers always entered. The numbers together with the name of the project should appear on the outside of the folder, on the project map, and on all reports in each division.



